UPMC

Instructions for Completing the Staff Member Tuition Assistance Request Form

Read this form and the information on the UPMC Infonet at http://benefits.infonet.upmc.com/TuitionEntry.htm. Neatly complete ALL requested items on the form. **Sign** and **date** the form and **submit** with required documents to the address or fax above. Please do not submit your information multiple times, send items separately, or include information from more than one term as this only serves to delay the processing of your information. Timely processing depends on your clear, accurate, and complete submission.

Advancement: *The following items must be submitted no later than 30 days after the class start date. Advancement requests received after 30 days are processed as reimbursements.* Advancement is only available for the University of Pittsburgh, Carlow University (CAP/Weekend program), Chatham University, Community College of Allegheny County, and UPMC Proprietary Schools. Allow 4-5 business days for an Advancement Letter to be issued and mailed to your home. Forward the letter to the student accounts office at your school to inform them of your eligibility. *Please note: Advancement Letters can not be faxed.*

Use this checklist to guide you in submitting all the required items for advancement:
Information from your school must be *pre-printed by the school* and include the student's name, semester, and school.

☐ Completed and signed Tuition Assistance Request Form
  - Print a new form from the Infonet each term to make sure you are using the most current version.
  - A separate request form is required for each term.

☐ Class schedule
  - Must have student's name, school, and semester pre-printed on it by the school.

☐ Invoice/itemized bill
  - Must specify exact amount of tuition, fees, and other charges as well as show the term, student, and school.

☐ Official proof of 3rd party payments showing method of payment
  - If you receive grants, scholarships, or other non-repayable funds, you must report the amounts of those payments.

Reimbursement: *The following items must be submitted within 6 months after the course completion/exam date.* Reimbursements can take up to 4 weeks to process and will be issued in the next paycheck after processing.

Use this checklist to guide you in submitting all the required items for reimbursement:
Information from your school must be *pre-printed by the school* and include the student's name, semester, and school.

☐ Completed and signed Tuition Assistance Request Form
  - Print a new form from the Infonet each term to make sure you are using the most current version.
  - A separate request form is required for each term.
  - Students attending schools with non-standard semesters must clearly indicate the courses being claimed and ensure the school documentation clearly specifies the course for which it pertains. Use a separate Request Form, if necessary.

☐ Invoice/itemized bill
  - Must specify exact amount of tuition or exam cost, fees, and other charges as well as show the term, student, and school.

☐ Official proof of payment showing method of payment
  - You must account for how the total bill for this term was paid. A receipt from the school is only acceptable if it clearly itemizes payments. If it does not, you will have to supply a copy of your cancelled check, credit card statement, verification of grant/scholarship award, or other documentation that details each payment's source.

☐ Proof of successful completion - grade report (certificate or test results if a certification exam)
  - Must obtain an "A", "B", "C", "P", or "S" grade.
  - If a certification exam, must pass the exam.

A Note About Taxes: UPMC complies with governmental taxing policies for tuition assistance. State and local taxes will be taken from tuition reimbursement at the time of payment. For tuition advancement, state and local taxes are deducted from your paycheck following the end of the semester.

Repayment of Tuition Assistance: Staff members must repay any tuition benefits received if termination or change to an ineligible job status occurs within 12 months from the course completion date. Repayment is taken from your final check (including accrued, unused paid time off payments) and any remaining balance is to be paid directly to UPMC within 30 days of termination. Staff utilizing advancement must also repay tuition when coursework is not completed successfully. The tuition assistance privilege is suspended while in repayment status.

STAFF MEMBER TUITION ASSISTANCE REQUEST FORM

See page 1 for completion instructions and documentation requirements for this request. Type or print legibly and complete all information in black or blue ink. Do not use abbreviations or acronyms. Incomplete forms will be returned.

Staff Member Information

Name: _____ Daytime Phone: _____

Last 4 Digits of Social Security #: XXX-XX- ☐☐☐☐ Job Status: ☐ Full-time/Flex Full-time ☐ Job Share/Reg Part-time

UPMC Employee ID # (required)*: ☐☐☐☐☐☐☐ Pay Frequency: ☐ Bi-weekly ☐ Monthly

If you do not have your UPMC Employee ID Number, you may obtain it in My HUB (select the Human Resources tab and then select View Job Information under My Profile), in Kronos, or from your supervisor. It is not found on your employee badge or health insurance ID card.

Program Information

Program/Course Type: (choose one)

☐ Associate's Degree ☐ Bachelor's Degree ☐ Master's Degree ☐ Ph.D.

☐ Certificate Program ☐ Non-degree Course ☐ Non-credit Course ☐ Challenge Exam/CLEP

☐ Certification Exam (do not abbreviate):_____ Exam Date: ___/___/___

☐ Pre-requisite (Anticipated Major:_____)

☐ Other:_____

Major: (do not abbreviate) _____

Semester: (choose one) ☐ Fall ☐ Spring ☐ Summer (Use a separate Request Form for each semester)

Semester/Class Dates: Start Date: _____/_____/_____ End Date: _____/_____/_____

Tuition Assistance Type and Documentation Checklist

Select the type of tuition assistance you are requesting and identify your school.
Use the checklist to ensure you are submitting all of the necessary documentation.

Tuition Advancement:	Tuition Reimbursement:
☐ University of Pittsburgh ☐ Carlow University CAP/Weekend ☐ Community College of ☐ Chatham University 　 Allegheny County ☐ UPMC Proprietary School	☐ University of Pittsburgh ☐ Community College of Allegheny County ☐ UPMC Proprietary School(UPMC owned school) ☐ Other accredited school (specify):_____
Tuition Advancement Checklist: **You must submit this form and both of the following items within 30 days from the start of the semester. See page 1 for details.** ☐　Class schedule ☐　Invoice/itemized bill	**Tuition Reimbursement Checklist:** **You must submit this form and all of the following items within 6 months after the class end date. See page 1 for details.** ☐　Invoice/itemized bill ☐　Proof of payment ☐　Proof of successful completion (grade report)

- For coursework where I receive tuition assistance, I understand UPMC expects successful completion and for me to remain an active, eligible employee for 12 months following course completion. In the event I do not, I understand I must repay to UPMC tuition assistance amounts received. If subject to repayment, I authorize UPMC to deduct the amount owed from my wages by means of payroll deduction without further authorization from me.

  - I agree to repay tuition assistance received for courses/exams completed in the 12 months prior to termination or a change to an ineligible job status. If I become responsible to repay this tuition assistance by virtue of the end of my employment, I authorize UPMC to withhold any outstanding wages due me, including any outstanding paid time off I might otherwise be eligible to be paid for at the end of my employment. A remaining balance is due to UPMC within 30 days of termination.

  - I agree to payroll deductions for the repayment of the total tuition advanced on my behalf for any courses I do not complete successfully including receiving a grade of "D" or less, a "Fail" in a pass/fail course, or not completing the course.

- I agree to allow any school or entity from which I submit for UPMC tuition assistance to release to UPMC any information regarding my enrollment including, but not limited to, registration status, grades, charges, and payments.

- I am declaring the information I am submitting to be correct and accurate. I understand any intentional false statement is considered an act of fraud.

_____ _____
Staff Member Signature Date